



**Supportive Services for Veteran Families (SSVF)
Program**

**COMPANION GUIDE:
November 2016 SOAR & Legal Survey**

The following companion guide provides 1) an overview of how to complete the November 2016 survey, and 2) detailed descriptions of each survey question.

SECTION 1: OVERVIEW

Survey Purpose: The November 2016 SOAR & Legal Survey aims to provide a more in-depth picture of how SSVF grantees are utilizing the SSI/SSDI Outreach, Access, and Recovery (SOAR) model and legal services to connect Veterans and their families with Social Security disability benefits, when eligible. It builds on the individual SOAR and legal surveys released by the SSVF Program Office in prior fiscal years to document the progress of community collaborations in increasing access to mainstream benefits and can lead to further efforts in establishing technical assistance with specific communities based upon their stated needs.

Survey Goals:

- Obtain an update on SOAR model and legal service utilization among SSVF grantees;
- Document grantee success in increasing access to SSI/SSDI using SOAR;
- Document success resolving legal cases via direct SSVF provision of legal services;
- Assess future SOAR training needs;
- Determine barriers to SOAR and legal service implementation and technical assistance needs;

How to submit: Similar to the previous survey the SSVF Program Office can only accept **one** survey submission per grant award. **Do not access the survey link below unless you are designated to complete the survey and are ready to submit your answers.** The SSVF Program Office has prepared several materials to assist with this process: 1) this Companion Guide and 2) a blank survey document to help you document your answers prior to completing the survey.

Accessing the Survey: The survey can be accessed using the following link:

<https://www.surveymonkey.com/r/8ZJPYXZ>

Please remember to select “done” to submit your response to the SSVF Program Office.

Survey Deadline: All survey responses must be submitted no later than: **December 21, 2016**

SECTION 2: SURVEY QUESTIONS

The below section provides detailed information for each survey question including: question number, question content, response options for each question, and guidance for completing each survey question.

Part 1: Demographics

Survey Question Number:	1
Survey Question:	SSVF Grant number
Response Options:	Drop-down list
Guidance/Description:	Select your SSVF grant number from the drop-down list.

Survey Question Number:	2
Survey Question:	Grantee/Organization name
Response Options:	Drop-down list
Guidance/Description:	Please select your SSVF grantee/organization name form the drop-down list.

Survey Question Number:	3
Survey Question:	Contact information
Response Options:	Multiple text fields
Guidance/Description:	Please provide the contact information (name, title, phone, and email address) for the person submitting this survey.

Part 2: SOAR Implementation

Survey Question Number:	4
Survey Question:	Do you currently use the SOAR (SSI/SSDI Outreach, Access, and Recovery) process to assist SSVF households in accessing Social Security disability benefits (SSI/SSDI)?
Response Options:	<ul style="list-style-type: none"> • Yes • No
Guidance/Description:	<p>SOAR is a national program designed to increase access to the disability income benefit programs administered by the Social Security Administration (SSA) for eligible adults who are experiencing or at risk of homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder.</p> <p>To use the SOAR process, case managers must complete at least 16 hours of approved training in SOAR either through the SOAR Online Course or through</p>

	in-person training delivered by SAMHSA-approved SOAR trainers. In addition, case managers must utilize critical SOAR components when assisting applicants and follow a local SOAR process .
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Survey Question Number:	5
Survey Question:	If you answered "Yes" to the previous question, how do you utilize SOAR?
Response Options:	<p>Check all that apply:</p> <ul style="list-style-type: none"> • Make a referral to an existing SOAR provider in the community • Provide the service within your agency (but not an SSVF-funded employee) • Provide the service directly through SSVF (SSVF staff member or subcontractor has completed at least 16 hours of training) • Other: (open text)
Guidance/Description:	Please answer this question only if you selected "yes" for question #4 and select all answers that apply to how you use SOAR internally and in coordination with other community providers. If you utilize SOAR in a way not described above, check the "other" box and provide a brief description.

Survey Question Number:	6
Survey Question:	In the communities that you serve, would SOAR be an added tool to assist Veteran households in accessing benefits and increasing income?
Response Options:	<ul style="list-style-type: none"> • Yes • No
Guidance/Description:	If the SOAR model is not present in your community, would it be useful to bring to your community in order to increase access to benefits and income? If you utilize SOAR in your community, do you see this as valuable tool?

Survey Question Number:	7
Survey Question:	How many Veteran households has your SSVF program served in FY16 (10/1/2015 – 9/30/2016)? Of those Veteran households, how many could benefit from SOAR to access SSI/SSDI during the grant year?
Response Options:	Numeric Values
Guidance/Description:	<p>The SOAR model is used to assist individuals who have serious mental or physical illnesses that affect their ability to work at a substantial gainful level (quantified as \$1,130/month in 2016). These illnesses or conditions need to have lasted, or be expected to last, for 12 months or end in death. <i>(Additional resource limits or prior work history are also factors in SSI/SSDI eligibility, but do not need to be taken into account for the purposes of this question)</i></p> <p>For the first part of this question, identify the number of households you served in FY16 (10/1/2015 – 9/30/2016). For the second part, indicate how many of those households have/had a Veteran or family member who may meet the above definition and could be eligible for SSI/SSDI and assisted using</p>

	the SOAR model. Please provide a numeric value only for this item (no text).
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Survey Question Number:	8
Survey Question:	Have any current staff from your SSVF program fully completed the SOAR Online Course (16 hours)?
Response Options:	<ul style="list-style-type: none"> • Yes • No
Guidance/Description:	<p>The SOAR Online Course is a free, self-paced curriculum that provides comprehensive training in how to complete SSI/SSDI applications using the SOAR model. Successful completion of the course entails submission of a practice SSI/SSDI application packet to the SOAR TA Center and requires approximately 16-20 hours to complete.</p> <p>Answer “yes” if you have <u>current staff</u> who have completed this training. If you are unsure, you can email soaronline@prainc.com for training verification.</p>

Survey Question Number:	9
Survey Question:	If the answer to the previous question is “yes”, how many current staff have completed the online training? <u>Please enter whole numbers only.</u>
Response Options:	Numeric Value
Guidance/Description:	Please answer this question only if you selected “yes” to question #8. Enter the number of <u>current staff</u> who have successfully completed the SOAR Online Course, including passing the practice case component of the training.

Survey Question Number:	10
Survey Question:	Do you currently have an SSVF-funded position for a Benefits Specialist or a SOAR Specialist?
Response Options:	<ul style="list-style-type: none"> • Yes • No • Other
Guidance/Description:	As part of your grant, do you have an SSVF-funded position whose primary focus is providing application assistance for benefits (e.g.: SSI/SSDI, VA benefits, or other mainstream benefits)? This position could either be dedicated to providing SOAR assistance or could assist with multiple benefit types.

Survey Question Number:	11
Survey Question:	If the answer to the previous question is “no” or “other”, do you plan to incorporate a SSVF-funded Benefits Specialist or SOAR Specialist into your grant?

Response Options:	<ul style="list-style-type: none"> • Yes • No • Other
Guidance/Description:	Please answer this question only if you selected “no” or “other” to question #10. Answer “yes” if you plan to incorporate this position into your grant during this grant year or “no” if you do not plan to incorporate a benefits specialist into your grant. If you are unsure of your plans or will be incorporating a benefits specialist in way other than described above, check the “other” box and provide a brief description.

Survey Question Number:	12
Survey Question:	What barriers do you have to implementing SOAR? (check all that apply)
Response Options:	<p>Checkbox options (select all the apply):</p> <ul style="list-style-type: none"> • Unsure what having a SOAR/Benefits Specialist would entail • Not sure how to get started • Funding • Limited to no buy-in from leadership • Staff capacity • Timing • Training/Technical assistance • Ongoing support • Connections to key stakeholders in the disability process • Other • None
Guidance/Description:	Please indicate any barriers you encounter with SOAR implementation in your community. If you are encountering barriers not described above, check the “other” box and provide a brief description. Responses to this question will be used to guide training and technical assistance priorities on a regional and national level.

Survey Question Number:	13
Survey Question:	Have any staff from your SSVF program been in contact with the SOAR state and/or local SOAR leads (listed on the SOAR website)?
Response Options:	<ul style="list-style-type: none"> • Yes • No
Guidance/Description:	State and local SOAR lead contacts may be found on the State Directory of the SOAR website. Please indicate if any staff from your SSVF program has been in contact with your state or local leads.

Survey Question Number:	14
Survey Question:	Are you interested in implementing SOAR with SSVF? If so, when?
Response Options:	<ul style="list-style-type: none"> • Yes, at least one SSVF staff member is completely trained in SOAR and is practicing SOAR with SSVF households. • Yes, we have already started training SSVF staff. • Yes, we want to start by the Fall of 2016.

	<ul style="list-style-type: none"> • Yes, we want to start by the Winter of 2017. • Yes, we want to start by the Spring of 2017. • Not sure, we want more information. • Not sure, we don't have the capacity to do it directly. • Not sure, we would be interested in using an existing SOAR provider.
Guidance/Description:	Please indicate your interest in implementing SOAR over the coming grant year, or if you are currently utilizing SOAR. Responses to this question will be used to guide training and technical assistance priorities on a regional and national level.

Part 3: SOAR Outcomes

Survey Question Number:	15
Survey Question:	If you use SOAR, how do you track outcomes for SSI/SSDI applications using the SOAR model?
Response Options:	Checkbox options (select all the apply): <ul style="list-style-type: none"> • SOAR Online Application Tracking (OAT) system • Homeless Management Information System (HMIS) • HOMES • Other internal tracking method • We do not track outcomes from completed applications
Guidance/Description:	Please enter the tracking method you utilize for SSI/SSDI applications completed using the SOAR model. If you use multiple tracking methods, please check all that apply. If you do not use SOAR, check "N/A."

Survey Question Number:	16
Survey Question:	If you are using SOAR, how many SSI/SSDI applications had you completed and received decisions for using the SOAR process in FY16?
Response Options:	Numeric
Guidance/Description:	Using data gathered from the SOAR Online Application Tracking (OAT) system, HMIS, or another internal tracking method, provide the number of SSI/SSDI applications that have been completed using the SOAR model during FY16 (10/1/2015 – 9/30/2016). Please provide a numeric answer only.

Survey Question Number:	17
Survey Question:	Of these decisions, how many have been approved for SSI/SSDI benefits?
Response Options:	Numeric
Guidance/Description:	If your program has completed SSI/SSDI applications during FY16 using the SOAR model, provide the number of these applications that have been approved for benefits. Please provide a numeric answer only.

Survey Question Number:	18
Survey Question:	Roughly what proportion of time are you able to complete the SOAR process while the Veteran family is enrolled in SSVF?
Response Options:	<ul style="list-style-type: none"> • N/A (We do not use the SOAR model) • All of our SOAR applications were completed while the Veteran family is enrolled • Most of our SOAR applications were completed while the Veteran family is enrolled • Half of our SOAR applications were completed while the Veteran family is enrolled • Only a few of our SOAR applications were completed while the Veteran family is enrolled • None, our SOAR applications were completed after the family exited the SSVF program • Unknown. We currently do not track this.
Guidance/Description:	For this question, provide the approximate proportion of time you are able to complete the SSI/SSDI using the SOAR process prior to the Veteran family exiting the SSVF program.

Survey Question Number:	19
Survey Question:	Do you also complete SOAR applications for members of the Veteran's household?
Response Options:	<ul style="list-style-type: none"> • N/A (We aren't doing SOAR currently.) • No, we only use the SOAR model with the Veteran • Yes, but only rarely • Yes, about half of our applications were for members of the Veteran's household • Yes, the majority of our applications were for members of the Veteran's household • Unknown. We currently do not track this.
Guidance/Description:	The SOAR model can be used to assist both Veterans and members of the Veteran family. Enter the approximate proportion of time you complete SSI/SSDI applications using SOAR for members of the Veteran's household.

Survey Question Number:	20
Survey Question:	If you are using SOAR, how long did the average application take to complete (<u>in hours</u>)?
Response Options:	Numeric
Guidance/Description:	Please enter the approximate amount of time (on average) applications took <u>in hours</u> to complete, including interviewing the Veteran for SSI/SSDI eligibility, completing the Social Security forms, writing a Medical Summary Report, and attending Social Security interviews with the applicant (when needed). Please provide a numeric answer only.

Survey Question Number:	21
Survey Question:	If you are using SOAR, how long on average did it take from submission to receipt of decisions (<u>in days</u>)?
Response Options:	Numeric
Guidance/Description:	Please enter the approximate amount of time (on average) applications took <u>in days</u> from the time all the application materials were submitted to Social Security until the decision was received. Please provide a numeric answer only.

Part 4: SOAR Program Description and Resource Needs

Survey Question Number:	22
Survey Question:	If you are currently using SOAR within your SSVF program, what does it look like? What is working/not working? Please describe.
Response Options:	Open text
Guidance/Description:	Please describe how you implement SOAR in your SSVF program and provide details about what is working and not working with your SOAR efforts. Responses to this question will be used to guide training and technical assistance priorities on a regional and national level.

Survey Question Number:	23
Survey Question:	What resources do you feel like you need to make SOAR a success? (Check all that apply)
Response Options:	<ul style="list-style-type: none"> • N/A. I feel we have the resources needed • More information about the SOAR model and SOAR Online Course • Time for staff to complete the SOAR Online Course and follow up training • Additional funding to support a dedicated benefits/SOAR specialist • Technical assistance and support while completing SSI/SSDI applications • Information on how to utilize the SOAR model with SSI/SSDI appeals through legal services • More guidance about how to integrate the SOAR model into SSVF activities • Local connections with Social Security Administration offices • Other:
Guidance/Description:	What resources (e.g. training, technical assistance, staff capacity, etc.) would help make SOAR a success within your SSVF program? Responses to this question will be used to guide training and technical assistance priorities on a regional and national level.

Survey Question Number:	24
Survey Question:	Comments/Feedback for SOAR TA Center.
Response Options:	Open text

Guidance/Description:	Please provide any other information about the utilization of SOAR in your SSVF program that would be helpful for the SSVF Program Office to know and was not addressed in the earlier questions.
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Part 5: Legal Services

Survey Question Number:	25
Survey Question:	How are you providing legal services in your SSVF program? Do you provide legal services directly using SSVF funds (either via direct staff hire or subcontract) or indirectly via referral?
Response Options:	<ul style="list-style-type: none"> • Legal services are provided directly (using SSVF funding) • Legal services are provided indirectly (referral only – no SSVF funds used) • Legal services are provide both directly and indirectly
Guidance/Description:	Please indicate whether your SSVF program provides legal services: 1) directly using SSVF funds (this can be accomplished either through direct hire of an attorney or via Memorandum of Understanding (MOU)/subcontract), 2) indirectly via referral, or 3) both directly and indirectly. Please note services are considered to be provided directly if SSVF funds are allocated for the provision of this service.

Survey Question Number:	26
Survey Question:	If you answered “Indirectly (referral only - no SSVF funds used) to the previous question, what are the reasons that you currently do not provide legal services directly through your SSVF grant?
Response Options:	<ul style="list-style-type: none"> • Lack of SSVF grant funds available • Different prioritization of SSVF grant funds • Inability to identify legal aid partner with which to contract services • Lack of demand/need amongst Veteran clients • Lack of resources to facilitate with legal services organization
Guidance/Description:	If your SSVF program is providing legal services through referral only (indirect) please indicate the reasons your program is not providing services directly. Select all answers that apply.

Survey Question Number:	27
Survey Question:	If your SSVF program is providing legal services directly, please provide the contact information for your legal provider:
Response Options:	Multiple text fields
Guidance/Description:	Please provide the contact information for your legal provider.

Survey Question Number:	28
Survey Question:	If your SSVF program has a MOU/subcontract to provide legal aid directly, what type of payment arrangement do you have?
Response Options:	<ul style="list-style-type: none"> • Flat fee for legal services and staff training • Hourly fee for legal services based on referral • Funding for a staff attorney dedicated to the SSVF program (including legal services; trainings, intakes/screenings, etc.) Payment is negotiable on a case-by-case basis • Legal services provided for free • Other:
Guidance/Description:	If your program provides legal services via MOU, please indicate the type of payment arrangement for services. Please only answer this question if your program provides legal services directly (using SSVF funds).

Survey Question Number:	29
Survey Question:	Based on your FY16 budget, were you able to expend the full amount that you had budgeted for legal services?
Response Options:	<ul style="list-style-type: none"> • Yes • No
Guidance/Description:	If your SSVF program provided legal services directly in FY16, please indicate if you were able to expend the full amount budgeted for the provision of legal services. Please only answer this question if your program provides legal services directly (using SSVF funds).

Survey Question Number:	30
Survey Question:	If you answered “No” to the previous question, please explain why:
Response Options:	Open text
Guidance/Description:	If your program was unable to expend the full amount budgeted in FY16 for legal services please explain why actual spending was lower than projected. Please only answer this question if your program provides legal services directly (using SSVF funds).

Survey Question Number:	31
Survey Question:	For how many of your SSVF program participants have you identified one or more issues on which an attorney can help? Please refer to program participants served during FY16.
Response Options:	<ul style="list-style-type: none"> • 0-25% • 26-50% • 51-75% • More than 75%
Guidance/Description:	Of the clients served by your SSVF program in FY16 please indicate roughly what percentage had one or more issues that an attorney could assist with.

Survey Question Number:	32
Survey Question:	Please list the top 5 legal issues that you clients face.
Response Options:	<p>Select up to 5 responses:</p> <ul style="list-style-type: none"> • Assistance obtaining SSI/SSDI benefits and/or assistance with claims for those benefits • Assistance obtaining VA benefits and/or assistance with claims for those benefits • Assistance obtaining other benefits (food stamps, etc.) • Outstanding warrants and/or court fees and fines • Criminal records expungement • Criminal allegations • Driver's license issues • Public transport exclusions • Victim of a scam (including bad checks, email and phone offers) • Identify theft or other credit problems • Student loan debts • Debt collection, general (including court hearings and/or phone harassment) • Bankruptcy • Getting phones/heat/electric installed or disconnected • Consumer purchase/sales agreement that didn't work out as expected • Problems with auto purchase or repair • School services for child (including discipline or special education) • Bullying/harassment of child at school • Job problems (hiring, firing, getting paid the right amount or on time, etc.) • Federal or state taxes (filing or getting the earned income credit or refund check) • Child visitation, custody, or child support • Enforcing or changing a court order related to family issues (including child support) • Dealing with a guardianship over a family member • VA guardianship review • Restraining order and/or stalking order advocacy • Relief from sex offender registration • Living in unsafe housing • Foreclosure on their house or the building in which they rent • Problems with landlord • Eviction (threatening or pending) • Need for reasonable accommodation in housing (including modifications, service animals, ramps, etc.) • Discrimination in housing (based on race, gender, disability, etc.) • Problems getting unemployment compensation • Problems with work-related injury and/or worker's compensation • Being sued by someone

	<ul style="list-style-type: none"> No legal issues identified
Guidance/Description:	Of the list provided, please select up to 5 legal issues that you have most frequently identify as barriers to your SSVF participants' housing stability.

Survey Question Number:	33
Survey Question:	Please provide the number of legal cases that your SSVF legal service provider component has opened and addressed in the following categories in FY16?
Response Options:	<p>Multiple numeric fields:</p> <ul style="list-style-type: none"> Legal issue presented has been resolved: Legal issue presented has NOT been resolved: Legal issue presented is still pending:
Guidance/Description:	Please provide a numeric value for each of the categories: legal cases resolved, legal cases that have not been resolved, and legal cases still pending. This question pertains to legal services provided directly through your SSVF award.

Survey Question Number:	34
Survey Question:	Based on the previous question, how many of the cases opened by your legal services provider component have resulted in:
Response Options:	<p>Multiple numeric fields:</p> <ul style="list-style-type: none"> Full-fledged representation: Limited or very short-term assistance/representation: Referral to another organization:
Guidance/Description:	How many of the above cases (from question 33) resulted in: 1) full representation by an attorney, 2) limited/short-term representation, and/or 3) referral to another organization for assistance. Please provide a numeric value for each of the categories.

Survey Question Number:	35
Survey Question:	How many veterans were seen <u>per month</u> by your legal services provider/attorney using SSVF grant funds in FY16?
Response Options:	<ul style="list-style-type: none"> 1-25 per month 26-50 per month 51-75 per month 75+ per month
Guidance/Description:	Please provide an estimate of the number of SSVF Veterans served by your legal services provider per month. This question only applies to grantees providing legal services directly through SSVF funds.

Survey Question Number:	36
Survey Question:	For the legal services you provide in obtaining SSI/SSDI benefits, do you utilize the SOAR model for assisting with the application and/or appeals?
Response Options:	<ul style="list-style-type: none"> • Yes • No
Guidance/Description:	If your program assists clients in obtaining SSI/SSDI benefits via legal services do you also utilize the SOAR model to assist with the application and/or appeals process?

Survey Question Number:	37
Survey Question:	How does your SSVF program identify legal issues among the Veteran households that you serve?
Response Options:	<p>Check all that apply?</p> <ul style="list-style-type: none"> • A legal aid provider participates in all Veteran intake/screening • Rely on case workers to independently spot issues • Case workers use a check-up/screening tools for all Veterans • Case workers are trained regularly by legal aid to identify and refer for legal services • Other (please describe):
Guidance/Description:	Please indicate how your program identifies possible legal issues among the Veteran households served in SSVF. Please select all that apply.

Survey Question Number:	38
Survey Question:	What obstacles do you have to providing legal services to eligible Veterans and their families?
Response Options:	<p>Check all that apply:</p> <ul style="list-style-type: none"> • Case workers lack training to identify legal needs • Legal aid cannot take some cases because there is no funding after 90 days • There are no legal aid programs in our service area • We don't have enough funding to provide legal services • We don't see enough demand for legal services • Other (please describe):
Guidance/Description:	Please indicate any obstacles your SSVF program faces in providing legal services to eligible Veteran households. Please select all that apply.

Survey Question Number:	39
Survey Question:	Do your legal services provider(s) staff a part-time legal clinic on-site at your VA location (Medical Center, CBOC, CRRC, or other)?
Response Options:	<ul style="list-style-type: none"> • Yes • No

Guidance/Description:	Please indicate whether your legal service provider(s) staff a legal clinic at your local VA. Many VA Medical Centers and/or VA funded Community Resource and Referral Centers invite local legal providers to staff part-time, on-site clinics.
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Survey Question Number:	40
Survey Question:	If you answered “no” to the previous question, do you wish to have your legal services provider(s) staff an on-site legal clinic at the VA?
Response Options:	<ul style="list-style-type: none"> • Yes • No • Unsure
Guidance/Description:	If your legal service provider(s) does not have staff on-site at your local VA facilities/CBOCs/ CRRCs, please indicate if this enhancement would be helpful for coordination of services/benefits for Veterans in your community. Please only answer this question if you responded “no” to question 39.

Survey Question Number:	41
Survey Question:	If you answered “no” to question 39, what are the reasons, if any, that there is currently no legal clinic on site at your VA location?
Response Options:	<ul style="list-style-type: none"> • Lack of resources available from legal services provider to staff legal clinic • Difficulty in obtaining approval from VA facility leadership • Difficulty in coordinating MOU with legal services provider • Lack of demand amongst Veteran population • Unknown
Guidance/Description:	Please indicate the reasons there is currently no legal clinic on-site at your VA location(s). Please only answer this question if you responded “no” to question 39.